

**MIDDLE ATLANTIC  
Region 1  
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Professional Development Award: ILLiad annual  
conference  
Albany College of Pharmacy and Health Sciences  
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## **Executive Summary**

The Albany College of Pharmacy and Health Sciences (ACPHS) is an urban college in Albany, New York. Including our satellite campus in Colchester, Vermont, the student population is approximately 1,600. ACPHS Library uses Docline and OCLC and is a member of Docline FreeShare and the Capital District Library Council resource sharing groups for interlibrary loan lending and borrowing.

In June 2011, the College purchased and installed ILLiad Resource Sharing System, a product of Atlas Systems, Inc. We installed ILLiad 8.1, which was the newest version of the software at the time. This is the first time the College has worked with this interlibrary loan processing system, and we fully implemented the system for the faculty, staff, and students in August 2011. Being new to ILLiad, I strongly believed attending the 2012 ILLiad International Conference would help strengthen our current use and knowledge of the processing system, interlibrary loan best practices, and how to use ILLiad to help with the ILL workflow of our institution.

The 2012 ILLiad International Conference was held on March 21-23, 2012 in Virginia Beach, Virginia. The Conference included a variety of one-to three-hour workshops and breakout sessions, with topics ranging from interlibrary loan (ILL) best practices to tips and tricks on how to make the most of ILLiad's vast capabilities. The website for the Conference is: <http://www.atlas-sys.com/conference/>

My co-worker, Kate Wantuch, and I both share ILL responsibilities. Although we have cross training in ILL, I mainly process borrowing requests while Kate mainly handles our lending requests. Kate and I were honored to have both been awarded the professional development grant by NNLM/MAR to attend the Conference. This provided us the opportunity to attend more sessions and take advantage of the Conference in a way we would not have had only one of us been able to attend.

## **Minority Populations Served**

African Americans: No  
American Indians/Alaska Natives: No  
Asian Americans: No  
Hispanics/Latinos: No  
Native Hawaiians and Pacific Islanders: No  
Other: No

## **Approaches and Interventions Used**

As I am new to interlibrary loan, in addition to learning more about ILLiad 8.1, I was hoping to learn ILLiad best practices that I could apply to my daily workflow. The ILLiad Preconference and Conference provided a variety of workshops that focused on tweaking ILLiad to meet our institution's specific needs, while teaching participants how to make the most of ILLiad's capabilities. Through my participation in the ILL-Listserv, I have received help and advice from veteran ILLiad users, many of whom attended the Conference. Meeting some of these people face-to-face and learning from their experiences was invaluable to me.

My main objectives were to learn how to become a more efficient ILLiad user and to develop personal contacts for resource and information sharing. The ILLiad Conference presented a unique opportunity to gain information and skills that will help me to better serve the Library's patrons.

At registration, Kate and I chose the sessions we thought we would benefit from the most, based on what we each hoped to gain from the Conference. I attended the sessions that focused more on borrowing workflow, while Kate attended those that pertained mainly to lending. Any sessions that were not borrowing or lending specific, such as administrative rights, we divided up evenly. Having a co-worker at the Conference allowed each of us to participate in a variety of learning opportunities. After sessions, and upon returning home, we shared with each other what we learned and how we thought we could implement ideas into our workflow.

URL to 2012 ILLiad International Conference Sessions:

<http://www.atlas-sys.com/conference/conference-sessions/>

## Evaluation Activities

Sessions I attended at the ILLiad Conference:

- What's New ILLiad? – Discussion of upcoming system upgrades
- DIY ILLiad Tune-Up: Borrowing – Ways to create an easier borrowing workflow
- Creating the Delivery Service of Your Patrons' Dreams – How one institution took survey results to create an ILL service their patrons love
- Beyond Out of the Box: Customizing the ILLiad Patron Interface – How to customize your ILLiad homepage, user registration, and ILL request page based on your institution's needs
- Hacking Your ILL Statistics – Creating statistics that accurately track requests in ILLiad
- One Button to Rule Them All! – How one institution created one button in their library catalog to make placing ILL requests even easier
- Leveraging Link Resolvers to Speed Processing - Using link resolvers and ILLiad Addons to increase workflow
- Keynote – 'Evolution: How Fast is Fast Enough?' presented by the President and CEO of OCLC, Jay Jordan – How accessing information is always changing and quickly evolving and libraries must be open and prepared for these changes
- OCLC Update: The Future of Delivery from OCLC presented by Katie Birch - An overview of new products and platforms provided and in production by OCLC
- Atlas Systems Update presented by Chief Customer Officer, Genie Powell – An overview of ILLiad's current 8.2 version and future 8.3 upgrade
- Poster Sessions with Wine & Cheese Social, sponsored by OCLC
- ILLiad's 15th Birthday Bash, sponsored by Atlas Systems

We currently use ILLiad 8.1, so it was great to hear about 8.2 and what is in store for 8.3's release in June. The Library is interested in using Article Exchange, and the Conference helped us to learn more about it. We are always interested in ways of making ILL more convenient for our users, and the session, 'Beyond Out of the Box: Customizing the Patron Interface', gave me the most ideas about how to accomplish this. Discussing my ILLiad questions and ideas with staff who have been using ILLiad for years gave me new ideas about workflow while I made connections with people from other institutions.

All the goals I set for the Conference, as mentioned in Approaches and Interventions Used, were accomplished. Attending the sessions, hearing what Kate learned in her sessions, and networking with staff from other institutions helped me to learn ILLiad best practices that I have already begun applying to my daily workflow. I also learned about ILLiad 8.2 and 8.3 and discovered ways to make the most of ILLiad's extensive capabilities for our College's population and needs. My main objective was to learn how to become a more efficient ILLiad user while developing personal contacts, and I accomplished both of these goals by the end of the Conference.

The ILLiad Conference was well organized and the presenters were open to answering questions and providing their contact information for follow-up. Since our Library implemented ILLiad in the summer of 2011, we have been creating a list of questions or upgrade suggestions we'd like to know more about. By the end of the Conference, all our questions or thoughts had been addressed. We returned home with realistic strategies and ideas that we have already begun to implement. Everyone involved with creating and organizing the Conference made sure all participants felt welcome and made themselves available at all times. I highly recommend any institution that uses ILLiad for interlibrary loan to attend this Conference.

## **Problems or Barriers Encountered**

N/A

## **Continuation Plans**

After attending the ILLiad Conference, Kate and I each made a list of ideas we thought would benefit our workflow and patrons. After briefing our Assistant Director of Library Services on the Conference and the ideas we'd like to implement, we came up with a list to work on:

1. Upgrade to ILLiad 8.3
2. Include the Article Exchange Addon to our ILLiad system to assist with Copyright Compliance
3. Customize more email and printing templates
4. Copy and paste email templates from C: drive to Customization Manager
5. For reports, split up our students by their year of study
6. Look into creating customized document delivery emails for faculty and 6th year students
7. Re-evaluate the wording on our patron interface to make registration and placing ILL requests even easier for our patrons
8. Customize our ILLiad homepage to provide a clearer overview of ILL services and ILLiad

## Impact

Upon returning from the 2012 ILLiad International Conference, Kate and I sat down with our Assistant Director of Library Services and shared with her what we each learned at the different sessions. We focused on sharing the ideas and tips we took away from the Conference that we felt would benefit our patrons and create a more efficient ILL workflow. After going through all my Conference notes and handouts, I made a list of short term goals that I want to complete by the end of the spring 2012 semester. Together, Kate and I created a long term list of goals we plan to accomplish over the summer.

In the few weeks since the Conference, I have already been able to complete a few of the goals on my short term list. During the 'DIY ILLiad Tune-Up: Borrowing session', presented by John Brunswick, I had the opportunity to learn more about routing rules from another Conference attendee. I recently created a routing rule that automatically routes requests in Customer Notified via E-Mail to Checked Out to Customer. This routing rule has already saved me a few steps needed to check in a loan from a lending library. Also, in 'What's New ILLiad?', Stephanie Spires showed me how to edit the Borrowing Loan Labels so they do not say "Do Not Photocopy". Before learning this, I was deleting this statement every time I wanted to print out the slip.

When our Albany and Vermont patrons register for an ILLiad account, we have them choose the state they live in. Currently, NY and VT are showing up as Ne and Ve. Presenter C. William Gee, in 'Beyond Out of the Box: Customizing the ILLiad Patron Interface', gave me some options as to where to look in order to fix this problem. I am also currently taking what I learned at the Conference to look into ways to not be prompted for loan slips that we do not use when checking a loan in or out. Also, our Library plans to upgrade to ILLiad 8.3 over the summer, which was a decision made as a direct result of hearing Genie Powell present the 'Atlas Systems Update'.

I am very thankful to the National Network of Libraries of Medicine for this opportunity to attend the 2012 ILLiad International Conference. One of my goals was to learn how to be more efficient in using ILLiad; attending the diverse sessions offered at the Conference and networking with staff from other institutions provided me the opportunity to learn practical tips—many of which we have implemented. The Albany College of Pharmacy and Health Sciences is already benefitting from what Kate and I learned at the Conference, and we plan to continue to use what we learned to create a more efficient ILL workflow that benefits all the College's patrons.



## **Lessons Learned**

One of the most valuable opportunities I had while at the ILLiad Conference was networking and learning from other attendees. I spoke with colleagues who have been using ILLiad for years and heard their suggestions for creating a more efficient ILL workflow. In speaking with those who were also fairly new to ILLiad, I appreciated hearing what they have done, and are doing, to streamline ILLiad for patron use. Some of the best suggestions I received (communicating with patrons through text messaging and making ILLiad accessible on handheld devices) reflect the direction many institutions are heading in regards to resource sharing. All participants were open to questions and sharing their ideas and experiences, and that alone made the Conference a wonderful experience. I came away from this Conference with realistic goals of ways we can customize ILLiad so that it is even easier for our patrons to use, and with enough knowledge and insight into ILLiad to make processing requests quicker both on the patron and staff end.

## Other

N/A

**Attachment 1: AR summary data: Subcontractor activities**